



**CRAWFORD
SMITH &
SWALLOW**

2021 T1 Individual Tax Return Information Organizer & Checklist

Name: _____ SIN: _____

Address: _____ Birthdate: _____
(YYYY/MM/DD)

City: _____ Province: _____ Postal Code: _____

Phone: _____ Business: _____ Cell: _____

Email: _____ Can we contact you by email? Yes: No:

Elections Canada:

Is the taxpayer a Canadian Citizen? Yes: No:

If yes to Canadian citizen, does the taxpayer authorize CRA to provide his/her name,
address and date of birth to Elections Canada to update his/her information on the
National Register of Electors? Yes: No:

Is the taxpayer a US Citizen? Yes: No:

Foreign Reporting:

Did the taxpayer own or hold foreign property with a total cost of more than \$100,000
CDN at any time during the year? (i.e. shares in foreign corporations, foreign rental or
commercial real estate, etc.) If yes, please provide details. Yes: No:

Income:

Please Check (✓) All Applicable Items

- | | |
|---|--|
| <input type="checkbox"/> T4 Employment Income | <input type="checkbox"/> T5 Investment Income |
| <input type="checkbox"/> T4A Employment Commissions | <input type="checkbox"/> T3 Trust Income (includes mutual funds) |
| <input type="checkbox"/> T4A(OAS) Old Age Security | <input type="checkbox"/> T5013 Partnership Income |
| <input type="checkbox"/> T4A(P) CPP Income | <input type="checkbox"/> T5008 Securities Transactions ** |
| <input type="checkbox"/> T4A Pensions and Other Income | <input type="checkbox"/> Capital dispositions ** |
| <input type="checkbox"/> T4A: CERB, CESB, CRB, CRSB, CRCB | <input type="checkbox"/> Sale of real estate, e.g. rental property or family cottage |
| <input type="checkbox"/> Foreign Pensions (please provide details) | <input type="checkbox"/> Rental Income & Expenses (please provide details) |
| <input type="checkbox"/> T4RSP RSP Withdrawals | <input type="checkbox"/> Business Income & Expenses (please provide details) |
| <input type="checkbox"/> T4RIF RRIF Withdrawals | <input type="checkbox"/> Support Payments |
| <input type="checkbox"/> T4E Employment Insurance | <input type="checkbox"/> T5007 Social Benefits Payments |
| | <input type="checkbox"/> Tips & Gratuities |

**** Provide annual statements for all mutual fund/stock investments held outside a RRSP ****
[see over]

Principal Residence Exemption:

Did you sell your home in 2021?

Yes: No:

Canada Revenue Agency wants to know:

Date of purchase: _____ (YYYY/MM/DD)

Proceeds of disposition: _____

Deductions: ** Please include receipts, statements and any other relevant documentation **

- RRSP Contributions to March 1, 2022
- RRSP Home Buyers Plan Repayments
- Lifelong Learning Plan Repayments
- Professional/Union Dues
- Moving Expenses
- Home Office/Employment Expenses Form T2200S or T2200 Detailed Method
- Support Payments
- Carrying Charges and Investment Expenses
- Other Deductions
- Employment Insurance Repayments
- Employment Expenses/Flat Rate Method provide # of days

Non-Refundable Tax Credits:

- Marital Status Change (provide date)
- Medical Expenses
- Infirm Dependent 18 and Older
- First Home Purchased during the year
- T2202A Tuition/Education Slip (signed by student for transfer)
- Charitable Donations
- Disability Tax Credit
- Interest Paid on Student Loans

Other:

- Political Contributions
- Instalment Payments
- Notice of Assessment/Reassessment
- Rent/Property Taxes Paid (include statement or receipts)

Direct Deposit: **Please include 'VOID' cheques or bank account information for the designated accounts**

Would you like your income tax refund and GST/HST credit direct deposited?

Yes: No:

Would you like your Canada Child Benefit direct deposited?

Yes: No:

Children and Other Dependents:

| Name | SIN | Relationship | Date of Birth |
|------|-----|--------------|---------------|
| | | | |
| | | | |
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****Please list anything else you would like us to know****
